

Accessing IDOLS – a Two Step Process

Part I – Access to DELTA (Database-Enabled Logon To Applications)

DELTA is DBHDS's single sign-on solution and security portal. It gives CSBs and private providers access to certain web applications, such as IDOLS.

Important Terms

Account: pertains to access to DELTA.

Application: IDOLS is one example of a DBHDS application.

User: anyone who logs in through DELTA in order to perform operations in IDOLS (i.e., uses this systems to communicate with ODS preauthorization staff). This person can access an application to which he/she has been granted access by his/her local administrator.

Roles

There are several roles in **DELTA**. Each ID or DS Waiver provider must have someone designated for each of these roles. It is highly recommended that providers have more than one person designated for each roll in order to have back-up capability should the primary person be away for an extended period. However, it is understood that small providers may not have sufficient staff to have back-ups for each role and single person providers (such as some Services Facilitators or Therapeutic Consultants) may have to perform all roles themselves.

The **agency head** requests DBHDS assignment of the Security Officer(s) and Supervisor(s) roles. These staff will manage the DELTA account for the agency. The request is made via the "DELTA – Production Account Request Form." The agency head completes one form for each person, indicating which role he/she will fill, and emails the form to the address as the top of the form. Security Officers and Supervisors will receive notification of approval to access **DELTA** via email. See below:

DELTA-Production Account Request Form

Submit completed form via email to: deltaprod@dbhds.virginia.gov

DELTA-PROD USER INFORMATION	
Location* (Agency Name)	<input type="text"/>
NPI/API* (number)	<input type="text"/>
Email*	<input type="text"/>
First Name*	<input type="text"/>
Middle Name	<input type="text"/>
Last Name*	<input type="text"/>
Position/Title	<input type="text"/>
Mailing Address	<input type="text"/>
City, State, Zip	<input type="text"/> , <input type="text"/> <input type="text"/>
Phone Number*	<input type="text"/>
Fax Number	<input type="text"/>
Location Role*	<input type="checkbox"/> Supervisor <input type="checkbox"/> Security Officer <input type="checkbox"/> IDOLS Local Admin <input type="checkbox"/> CHRIS Local Admin

After the Security Officer and Supervisor receive their notifications from DBHDS (see below), they will complete all other account and application related approvals, modifications and terminations themselves via the **DELTA** portal.

Dear Tom Jones,

You have been assigned an account in the DELTA application at Virginia's Department of Behavioral Health and Developmental Services (DBHDS). DELTA is DBHDS' security portal to our web applications.

Following are your user account details:

Username: CSXXXXXX

Initial Password: yXXXXXX

Email: Cheri.stierer@dbhds.virginia.gov

Title:

Location: Blue Ridge Behavioral Healthcare Phone Number: 8047860803

Fax Number: 8046920077

When you logon to DELTA for the first time, you will be prompted to change your password and set up your security question. You must complete this step by 9/23/2011. Also, specific application access will not be granted until you have completed this step.

Supervisor: The Supervisor role is set by the DBHDS Global Administrator through the process stated above involving the request of the agency head. Once set, the Supervisor approves other agency staff to be Local Administrators. The tasks completed by the **Supervisor** role are:

- Requesting **DELTA** accounts for new Local Administrators and Users (who have never used the **DELTA** portal before). Steps for this:
 - Supervisor logs into **DELTA** and goes to the "Manage Users" tab and clicks on "Account Request Form."
 - Use the "New Request" button. Complete the form and submit electronically.
 - This then goes to the Security Officer for final approval.
- Approving/denying new **DELTA** accounts for Local Administrators and Users (except for his/her own – that is done by the agency head as stated above). [**NOTE:** either the Supervisor OR Security Officer can perform this function.]
 - Supervisor logs into **DELTA** and goes to "Manage Users" tab and clicks on "Pending Account Request."
 - A list of waiting requests will appear.
 - Click "PROCESS" to select the user to be approved/denied.
 - Click "Approve" or "Deny," as appropriate.See below:

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Virginia Department of Behavioral Health and Developmental Services

Home > Manage Users > Admin Account Reset Location: DBHDS Central Office

My Account

- My Applications
- Change Password
- Change Security Question
- My Information
- Change Location
- Logout
- Manage Users**
- Admin Account Reset
- Account Request Form
- Pending Account Requests
- Pending Application Requests
- Manage Applications
- Applications
- Application Locations
- Manage Locations
- Location Types
- Locations
- DELTA Management**
- DELTA Settings
- Lookup Lists
- Resources
- Help
- About
- Contact Us
- Privacy Policy

Search for a user

Enter at least one search criteria.

Username:

First Name:

Middle Name:

Last Name:

Email Address:

Results

Select	Username	First Name	Last Name	Phone	City
Select	AHb8a4ef	Andrea	Hawley		
Select	CH1f579f	Cheryl	Holt	(540) 345-9841	
Select	DH5aee7	Debra	Hall		
Select	DH73b8be	Diana	Henley		
Select	KH09f48c	Kathi	Honeycutt1		
Select	KH6f551a	Kathi	Honeycutt		
Select	KHe380eb	Kathi	Honeycutt (Gmail)		
Select	LHead15f	Lawrence	Hooven		
Select	MWb60ebb	Angela	Harrison		
Select	PH4a6e58	Patricia	Handy		

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DELTA

Select "Pending Account Requests" Search screen comes up, put in search criteria. Then select from the list above.

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Home > Manage Users > Pending Account Requests Location: DBHDS Central Office

My Account

- My Applications
- Change Password
- Change Security Question
- My Information
- Change Location
- Logout
- Manage Users**
- Admin Account Reset
- Account Request Form
- Pending Account Requests
- Pending Application Requests
- Manage Applications
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Search

Location:

Locations are limited to those that have pending account requests.

Pending Account Requests

	Username	First	Last	Position	Email	Date
Process	MWb60ebb	Angela	Harrison		angela.harrison@dbhds.virgi...	7/29/2011

DELTA

Just click "Process" on that person.

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Virginia Department of **Behavioral Health and Developmental Services**

Home > Manage Users > Pending Account Requests > Account Request Location: DBHDS Central Office

My Account

My Applications

Change Password

Change Security Question

My Information

Change Location

Logout

Manage Users

Admin Account Reset

Account Request Form

Pending Account Requests

Pending Application Requests

Manage Applications

Applications

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Request Summary

Existing Account

Name: Angela Harrison

Email: angela.harrison@dbhds.virginia.gov

New Location

Location: Western State Hospital

Date Range: 7/29/2011 to 7/29/2011

Action	Application	Related Application	Role
Grant	DELTA		Supervisor

Requested By

Name: Phyllis Harden-West

Email: Phyllis.Harden-West@DBHDS.Virginia.gov

Phone Number: (804) 225-2961

DELTA

Then Approve. Notice the ACTION is Grant, the APPLICATION is Delta and the Role which in this case is Supervisor.

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Virginia Department of **Behavioral Health and Developmental Services**

Home > Manage Users > Pending Account Requests > Account Request Location: DBHDS Central Office

My Account

My Applications

Change Password

Change Security Question

My Information

Change Location

Logout

Manage Users

Admin Account Reset

Account Request Form

Pending Account Requests

Pending Application Requests

Manage Applications

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Application Locations

Manage Locations

Location Types

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Request Summary

Existing Account

Name: Angela Harrison

Email: angela.harrison@dbhds.virginia.gov

New Location

Location: Western State Hospital

Date Range: 7/29/2011 to 7/29/2011

Action	Application	Related Application	Role
Grant	DELTA		Supervisor

Requested By

Name: Phyllis Harden-West

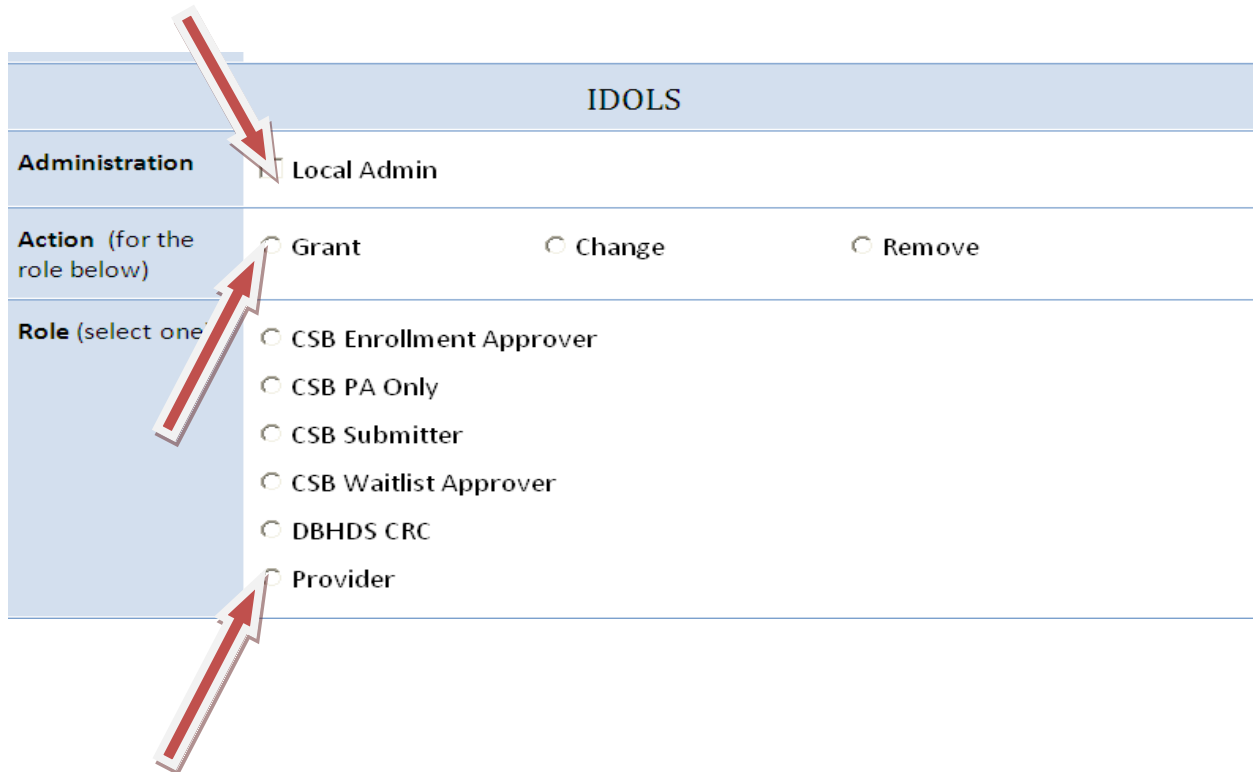
Email: Phyllis.Harden-West@DBHDS.Virginia.gov

Phone Number: (804) 225-2961

DELTA

Then Approve. Notice the ACTION is Grant, the APPLICATION is Delta, and the Role which in this case is Supervisor.

- Requesting an **Application** (i.e., **IDOLS**) access for new Users [**NOTE:** this can be done at the same time as “Requesting **DELTA** account for a new User” – see first bullet above.]
 - Supervisor logs into **DELTA** and goes to the “Manage Users” tab and clicks on “Account Request Form.”
 - Use the “New Request” button. Complete the form and submit electronically.



IDOLS	
Administration	Local Admin
Action (for the role below)	<input type="radio"/> Grant <input type="radio"/> Change <input type="radio"/> Remove
Role (select one)	<input type="radio"/> CSB Enrollment Approver <input type="radio"/> CSB PA Only <input type="radio"/> CSB Submitter <input type="radio"/> CSB Waitlist Approver <input type="radio"/> DBHDS CRC <input type="radio"/> Provider

- Modifying existing Users' **Application** (i.e., **IDOLS**) access
 - Supervisor logs into **DELTA** and goes to “Manage Users” tab.
 - Click on “Account Request Form”
 - A search screen will come up. Enter search criteria (such as employee’s last name).
 - A list will appear. Click “Select” next to the user’s name.
 - Go to the Application to make the needed role change.

See below:

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Welcome: Phyllis Harden-West

Virginia Department of Behavioral Health and Developmental Services

Home > Manage Users > Admin > Reset

Location: DBHDS Central Office

My Account

- My Applications
- Change Password
- Change Security Question
- My Information
- Change Location
- Logout

Manage Users

- Admin Account Reset
- Account Request Form
- Pending Account Requests
- Pending Application Requests

Manage Applications

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Search for a user

Enter at least one search criteria.

Username:

First Name:

Middle Name:

Last Name:

Email Address:

Results

Click on “Account Request Form.” A list will appear. Click “Select” next to the user’s name. Go to the Application to make the needed role change.

- Terminating Users’ **DELTA** accounts (e.g., for Users who leave an agency)
 - Supervisor logs into **DELTA** and goes to “Manage Users” tab.
 - Click on “Account Request Form”
 - A search screen will come up. Enter search criteria (such as employee’s last name).
 - A list will appear. Click on “Select” next to the User’s name.
 - In the form, enter an expiration date.

Security Officer: The Security Officer role is set by the DBHDS Global Administrator through the process described on the previous page involving the request of the agency head. When a Supervisor submits a new **DELTA** account request, the **Security Officer** receives an email notification. A User’s **DELTA** account is only updated when the **Security Officer** approves the request. The tasks completed by the **Security Officer** role are:

- Approving or denying **DELTA** account access (except for his/her own – that is done by the agency head as stated above). [NOTE: either the Security Officer OR Supervisor can perform this function.]
 - Security Officer logs into **DELTA** and goes to “Manage Users” tab and clicks on “Pending Account Request.”
 - A list of waiting requests will appear.

- Click “PROCESS” to select the user to be approved/denied.
- Click “Approve” or “Deny,” as appropriate.
- Resetting passwords. Steps for this:
 - Security Officer logs into **DELTA** and goes to the “Manage Users” tab and clicks on “Admin Account Reset.” The “Search” form appears.
 - Put in one initial or full name (either first or last) to find the user who needs their password reset.
 - The staff list will appear with possible matches. Select the person by using the “Select” button next to the correct name.
 - The next screen is where the **Security Officer** resets the password. Click the button “Reset Password.” It will ask if you are sure. Confirm and an automatic email will be sent to the user with their temporary password. This email does not include the username\ID on it.

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Home > Manage Users > Admin Account Reset

Location: DBHDS Central Office

My Account

- My Applications
- Change Password
- Change Security Question
- My Information
- Change Location
- Logout

Manage Users

- Admin Account Reset
- Account Request Form
- Pending Account Requests
- Pending Application Requests

Manage Applications

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Manage Locations

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Search for a user

Enter at least one search criteria.

Username:

First Name:

Middle Name:

Last Name:

Email Address:

Results

DELTA

Reset Passwords, ADMIN ACCOUNT RESET

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Home > Manage Users > Admin Account Reset Location: DBHDS Central Office

My Account

My Applications

Change Password

Change Security Question

My Information

Change Location

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Manage Users

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Search for a user

Enter at least one search criteria.

Username:

First Name:

Middle Name:

Last Name:

Email Address:

Results



Search form appears, put in one initial or full name either first or last to find the user who needs their password reset. This is done by the SECURITY OFFICER.

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Home > Manage Users > Admin Account Reset Location: DBHDS Central Office

My Account

My Applications

Change Password

Change Security Question

My Information

Change Location

Logout

Manage Users

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Search for a user

Enter at least one search criteria.

Username:

First Name:

Middle Name:

Last Name:

Email Address:

Results

Select	Username	First Name	Last Name	Phone	City
Select	AHb8a4ef	Andrea	Hawley		
Select	CH1579f	Cheryl	Holt	(540) 345-9841	
Select	DH5aece7	Debra	Hall		
Select	DH73b8be	Diana	Henley		
Select	KH09f48c	Kathi	Honeycutt1		
Select	KH6f651a	Kathi	Honeycutt		
Select	KHe380eb	Kathi	Honeycutt (Gmail)		
Select	LHead15f	Lawrence	Hooven		
Select	MWb60ebb	Angela	Harrison		
Select	PH4a6e58	Patricia	Handy		

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Depending on your search criteria, the list will appear with possible matches. Select the person by using the SELECT button next to their name.

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Home > Manage Users > Admin Account Reset Location: DBHDS Central Office

Administrative Account Reset

User to reset: AHB8a4ef

Name: Andrea Hawley

Email: andrea.hawley@mrcsb.state.va.us

Position:

Address: , VA

Phone Number:

Fax Number:

Last Activity: 7/13/2011 7:55:01 PM GMT

[Reset Password](#) [Cancel](#) [Return to Search](#)

My Account

My Applications

Change Password

Change Security Question

My Information

Change Location

Logout

Manage Users

Admin Account Reset

Account Request Form

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Next screen is where you reset the password. Just click the button. It will ask are you sure; confirm and an automatic email will be sent to the user with their temporary password. This email does not include the username\id on it.

Part II – Access to IDOLS (Intellectual Disability On-line System) for Service Authorization Purposes

Local Administrator: Agencies may have different Local Administrators for different **DELTA**-enabled applications (**IDOLS** is only one application accessed through **DELTA**). The Local Administrator is the primary contact for the agency regarding a particular DBHDS **application** (i.e., IDOLS). The tasks completed by the **Security Officer** role are:

- Approving or denying User's **IDOLS** initial access
 - Local Administrator receives a request from the Supervisor for a new User to access IDOLS
 - Local Administrator logs into DELTA and goes to "Manage Users" tab.
 - Click on "Pending Application Requests."
 - A list of waiting requests will appear.
 - Click "PROCESS" to select the user to be approved/denied.
 - Click "Approve" or "Deny," as appropriate.

- Modifying a User's **IDOLS** access (e.g., if a staff person's role in IDOLS needs to change).
 - Local Administrator receives a request from the Supervisor for an existing User's role to change
 - Local Administrator logs into **DELTA** and goes to "Manage Users" tab.
 - Click on "Account Request Forms."
 - A search screen will come up. Enter search criteria (such as employee's last name).
 - A list will appear. Click "Select" next to the user's name. A form will come up populated with that User's current role.
 - Go to the Application to make the needed role change.

- Revokes **IDOLS** access.
 - Local Administrator logs into **DELTA** and goes to "Manage Users" tab.
 - Click on "Account Request Forms"
 - A search screen will come up. Enter search criteria (such as employee's last name).
 - A list will appear. Click on "Select" next to the user's name. A form will come up populated with that User's current role.
 - In the form, enter an expiration date.

The Local Administrator should be familiar with **IDOLS** and each particular role for **IDOLS**. For ID/DS Waiver Service Authorization initiation purposes, the role is "Provider."

Each CSB or licensed provider must have at least one primary **Local Administrator** and at least one backup **Local Administrator**.

When a Supervisor submits a request form, the **Local Administrator** receives an email notification. A user's permissions to **IDOLS** aren't updated until the **Local Administrator** approves the request. If the request is for a staff person who has never before had access to **DELTA** (a **new DELTA** account vs. a change to an existing **DELTA** account), the **Local Administrator** will not receive an email notification until after the Security Officer approves the request for access to **DELTA** (see steps under Security Officer above) and the new user logs in to **DELTA** for the first time.

EXAMPLE:

Gaining Access to DELTA for a New Staff Person:

1. New employee/User, Susie Staff, needs **DELTA** access in order to complete entries in **IDOLS**.
2. The agency **Supervisor** or **Local Administrator** logs into **DELTA**, goes to "Manage Users," clicks on "Account Request Form," completes the **DELTA-Production Account Request Form** and clicks on "Submit" By doing so, he/she sends the information to the "Pending Account Request" location in **DELTA**.
3. If the above task was completed by the **Supervisor**, then the **Security Officer** will receive an email informing him/her that there is a new request under the "Pending Account

Request” tab. If the above task was completed by the **Local Administrator**, the **Supervisor** can perform the approval. Either the **Security Officer** or **Supervisor** logs into **DELTA**, goes to “Manage Users,” clicks on “Pending Account Request,” clicks on “Process” next to Susie’s name, confirms that Susie is an employee, then clicks on “Approve.” This triggers an email to Susie.

4. Susie (the **User**) gets her user ID and password for **DELTA** via an email. She logs into **DELTA** for the first time, changes her password and picks a security question. She cannot yet access **IDOLS**.

Gaining Access to IDOLS for a New Staff Person:

5. The **Supervisor** requests **IDOLS** access for new User, Susie Staff, by logging into DELTA and going to the “Manage Users” tab where he/she clicks on “Account Request Form.” Using the “New Request” button, the supervisor completes the form and submits in electronically.
6. The **Local Administrator** receives an email notification that the **Supervisor** has requested **IDOLS** access for Susie (**DELTA** access has already been granted per above).
7. The **Local Administrator** logs into DELTA, goes to “Manage Users,” clicks on “Pending Application Request,” clicks on “Select” next to Susie’s name, then clicks on “Process,” then “Approve.”
8. Susie can access **IDOLS**. She will not receive an automatic email notification. The **Local Administrator** may want to send her one.